CAMI MARCH MEETING

ARMED FORCES INTEREST GROUP

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Time Line

(CAMI Management Approved Mar 03- Adjusted Jan 04)

- **Jun & Sep 03**
- **December 03**
  - Agree to principles
  - Agree to Contents
  - Get survey update
  - Teams organized
  - Assignments for next meeting
- **February (alt 1)**
  - Survey complete
- **March 04**
  - Sunday pm team ldrs meet
  - Complete draft presentation
    - Potentially w/o case studies
  - Identify any survey holes
  - Present writing plan
  - Begin writing overview & principles
- **June 04**
  - Complete draft presentation
    - With case study
  - Begin writing case studies
- **September 04**
  - Complete presentation
  - Present to CAMI members
    - Invite service cost leaders
  - Complete draft case studies
  - Determine next steps
- **October 04**
  - Conduct interim meeting
  - Complete blue book draft
- **December 04**
  - Submit blue book to CAMI
  - Issued to members at next meeting

Jan Responsibilities/Actions

- **Presentation team leaders: Develop presentations**
  - Paul/Dave/Ben work hard on presentation
  - Meet Sunday afternoon with core
  - Copy Bob Little on updates
  - Post on web NLT end of February
- **Literature Team: Lit search**
  - Each service POC provide to NPS –
    - Gene, Al, Paul, Brian, Lanelle will provide
  - Provide bibliography and key articles (disc)
- **Bob: Work on survey**
  - Bob completes survey mechanics
  - Bob works through BIC for permission on survey
  - Team leads help Bob understand info
  - Conduct best survey in February
- **Chuck: Writing process**
  - Writers develop plan and concept for their process to convert the presentations into written material in consonance with presentations:
- **Other:**
  - Dave: DLA and DFAS participation/ Send slides out to Jason/survey permission at DoD
  - Contact new attendees, or those who missed (0730 Monday)
  - Paul will set up best practice discussions
  - Paul's team will get Passion before Productivity

Guiding Principles for CPM

- Enabling (how the work is done)
  - **Outcomes before outputs**
  - **Readiness before cost**
  - **Targets before tasks**
  - **Strategy before work**
  - **Simplicity before scale**
- Imperatives (will be there in every case)
  - **Passion before productivity (leadership)**
  - **Meaning (mission) before mandates**
  - **Burning platforms before politics**

Teams

- **Survey Team**
- **Lit Search/Bibl Team**
- **Writing Team**

- **Team 1: (Chapters 1-4)**
  - 1. Introduction
  - 2. Readiness before cost
  - 3. Meaning (mission) before mandate
  - 4. Passion before productivity
- **Team 2: (Chapters 5-9)**
  - 5. Targets before tasks
  - 6. Strategy before work
  - 7. Outcomes before outputs
  - 8. Burning platforms before politics
  - 9. Simplicity before scale
- **Team 3: Chapter 10**
  - 10. Conclusions/Implications
- **Team 4: Chapter 11**
  - 11. Case Studies

Team Members

- **Survey (Thad)**
  - Pat
  - Ambrose
  - Steve
- **Literature (Matt)**
- **Writing**
  - Chief editor - catherine)
  - Dave
  - Mohan
  - Gene

- **Team 1 (Thad)**
  - ?
- **Team 2 (Stefnie)**
  - Will
  - Mike
  - Marc
  - Dennis
- **Team 3 (Dave)**
  - Al - Norm
  - Brian
- **Team 4 (Jason)**
  - Mike
  - Lanelle
  - Paul (USAF) -- Steve Connair
  - Boodi --Gene

- **Team 1: (Chapters 1-4)**
  - –1. Introduction
  - –2. Readiness before cost
  - –3. Meaning (mission) before mandate
  - –4. Passion before productivity
- **Team 2: (Chapters 5-9)**
  - –5. Targets before tasks
  - –6. Strategy before work
  - –7. Outcomes before outputs
  - –8. Burning platforms before politics
  - –9. Simplicity before scale
- **Team 3: Chapter 10**
  - –10. Conclusions/Implication s
- **Team 4: Chapter 11**
  - –11. Case Studies

March 04 Meeting Plan

- **Sunday (1400-1630)**
  - Team leaders meet to get organized (3 hr)
- **Monday (0800-1700)**
  - Process Update (.5 hr)
    - Clifton/Kenny
  - Review outline (.5 hr)
    - Clifton/Kenny
  - Survey Team (20 min)
  - Case Study Team (20 min)
  - Lit team (20 min)
  - Team 1 (4 hr)
  - Team 2 (1 hr)
  - Team D&D (optional)
- **Tuesday (1300-1700)**
  - Team 2 (4 hr)
- **Wednesday (0800-1130)**
  - 0800 Complete Team 2
  - 0900 Writers brief process (1 hr)
    - Royer/Stenzel
  - 1000 Review last two principles
  - 1100 Assignments (.5 hr)

Briefing Process

- **Team leaders talks us through each chapter**
- **Group discuss definition/clarify**
- **Group identifies case studies**
  - Success and less than satisfactory
- **Paul Baca and group identify literature search items**

Expected Outputs March Meeting

- **Outline Teams**
  - Final, detailed team outlines to writers
- **Writing team**
  - Agreed writing team process
  - Writing assignments for each chapter (1-2 people)
  - Chief editor assigned (Catherine + one other)
- **Survey/Case study teams**
  - Action plan/process to complete surveys
  - Action plan/process to complete case studies
    - According to written format
  - Clear responsibility for case study writing
- **June actions/tentative agenda**

Presentation Contents

- **Purpose and objectives (1 slide)**
  - Why we're doing this
  - What will be different
- **Lay out Main Points in words (1-2 slide)**
- **Present a visual of main point (s) 1 (slide)**
- **Lay out key take aways (1 slide)**
  - What will be different
- **Info requirements (1 slide)**

Case Study Elements

- **Introduction**
  - Objectives of the implementation
  - Principles demonstrated by the implementation
  - How does it add to the services' mission
- **The Study**
  - General (demographic stuff/objective of initiative)
  - Detail of case study (describe baseline/results)
- **Findings**
  - Relate to guiding principles
  - Value to organization
    - What was the success, what was the result
    - What difference did the PCM initiative make?
  - Lessons learned
- **Group feedback (will not be included in write up)**

Issues/Discussion

- **Writing team responsibility**

Assessment Tool

- **Survey will be used to down select to final case study organizations**
- **Will work with writing teams to tweak assessment tool**
- **Send assessment tool to those we want to do case study on**
  - Assessment goes to points of contact identified on survey
  - Start with call and alert them of a follow-up email coming next day
  - In email, thank them for participation, here is what we found so far and here is what we are hoping you'll give us now
  - Assessing individual projects and organizations
  - Add a maturity section so they can rate their mature level at the organizational unit
  - Plus 6-10 questions for each principal
- **Discussion on need for tact in processing the assessment, people may start getting tired of responding**

Time Line

- **Survey/Assessment**
  - Complete by mid April
  - Analysis done by end of April
- **Case Studies**
  - Start writing outline in April
  - Detail outline delivered by end of May
  - Complete written case studies in August

Writing:

First two weeks of June, complete detailed outline/draft presentation

Next steps/Before June Meeting

- **Jason will publish current outline on Monday**
- **Make assignments on case studies and writing (today)> Outlines by end of May. Use Format in briefing.**
- **Complete assessment questions: Needs to be done by 15 april**
  - Need to test assessment questions with case study writers
  - Set up conference call to tie up any loose ends
  - sort out assessments and case study process
- **Stefnie set up regular conference calls**
  - to improve principals definition
  - mid term progress (10 May)/(24 May)
- **Complete surveys (by 9 apr)**
- **Matt goes through literature search**
- **Complete survey assessments (end of April TBD)**
- **Start case initial study (see next chart) NLT beginning of May**
  - Includes collecting assessment info
- **Complete case study outline and send to Dave (end of May)**
- **Complete presentation outline (mid June)**

Case Studies

- **Coast Guard:**
  - Paul Coast Guard Support Center
  - Thad ARSC
- **Jason/Brian/Matt/Boodi**
  - CNI
- **Marine Corps**
  - Pat for Camp Lejeune
- **Air Force**
  - Mike Eglin
- **Army**
  - Lannel Ft Huachuca, Ft. Hood, Ft. Bragg

- **Outline work**
  - Dave
  - Mohan
  - Gene

Backup Slides

Cost & Performance Practices: (1) Investigation and (2

Military Strategic Operations

Corporate mutation Post WWII

Less mature Corporate practices force fit to more mature institutio

(1) Corporate B.practices

(2) Government/DoD

President Bush, MBA Management Agenda

Accountability to Citizens

Service Mission

Purpose: National Security

Purpose =Max investor wealth = profit mission

Possibility of Mis-aligned practices

Cost & Performance Practices

- Unbalanced perspective (BSC) =
  - strategic financial aims
- Detached from actual work/people

Evolutionary Antidotes:

- **Mission-based cost and performanc**
- **Comprehensive vs. balanced perspe**
- **Unit-Corps-Country Logic &Links**

- **Run the Dept. like a business**
- **Break down events into pieces**
- **Budget myopia**
- **ROI on taxpayers' dollars = wrong unit of measures**

(3) Continuous Development in the understanding that people,not orgs, spend & perform

(4) Guiding Principles ba on mission execution

Introduction to CAMI

- **We thought there was an opportunity**
  - Small group discussed “burning platforms” for sponsor groups within a common community
- **We were right**
  - 15 highly enthusiastic participants representing 9 sponsors validated this opportunity in exploratory session
- **This is a different interest group**
  - It’s a community based group to look at many methodologies
  - Not a methodology based group to look at

Vision

A framework, guiding principles and chosen practices that accelerate and sustain constant innovation in the application of cost and performance management through a documented investigation of significant learning and experiences.

Mission

- **Leverage CAM-I as a collaborative forum to:**
  - Deliver a coherent set of guiding principles and concepts for cost and performance management implementation and sustainment in the armed service.
  - Base the principles on practical experiences within the armed services and CAM-I concepts and tool sets.

Deliverables

- **CAM-I Blue-book (Q3 (now Q4) CY 2004)**
  - Survey of relevant literature and bibliography
  - Report: Case Studies and lessons learned in Armed Services
- **Workshop/Presentation(s) that help accelerate use of cost-performance management methods/practices (Q1 CY 2005)**
- **Stretch Goal: Publication (Q4, CY 2005)**
- **Quarterly CAM-I presentations (As required)**

Benefits/Value Proposition

1. **Traction partnering with CAM-I to accelerate the cost and performance management quest.**
2. **Contribution to CAM-I body of knowledge by Armed Services sponsors.**
3. **A playbook for how one of the world's largest and most complex organizations guides itself in the execution of cost and performance initiatives which has use to all CAM-I sponsors.**
4. **Expansion of cost and performance principles developed by CAM-I that more easily resonates with community.**
5. **Provide tools, knowledge and information that facilitate institutional buy-in**
6. **Examines potential of a community-based interest group**